



**DEPARTMENT OF  
BUDGET & MANAGEMENT**

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Deputy Secretary

**PRE-PROPOSAL CONFERENCE SUMMARY PROJECT No. F10R7200001  
Consultant and Actuarial Services for State Employee and Retiree Benefits Program  
July 14, 2006**

Ladies/Gentleman:

The State of Maryland conducted a Pre-Proposal Conference at the State Office Complex, Baltimore, MD, on July 14, 2006. An attendance list with the names of those attendees signing in is located at Attachment 1.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer convened the conference, recognized the State and Department (DBM) people present, and reiterated that all vendors sign in. The Procurement Officer advised that a transcript of the conference would be available through the Conference Reporting Services. Vendors interested in obtaining a copy of the transcript should contact CRS via the information below. Further the Procurement Officer advised vendors present to send the Procurement Officer an e-mail to be added/deleted from the vendor list for all information pertaining this RFP.

The Deputy Chief of Procurement, Bill Bowser, reviewed the RFP:

Section 1-reviewed points related to type, terms and conditions of the solicitation,  
Section 4-reviewed proposal submission guidance and requirements, and  
Section 5-explained the evaluation process and how the State will select the most advantageous proposal.

The following Attachments were reviewed:

Attachment A- pointed out that the contract takes precedence over all other materials that might be included by reference such as the RFP and contractor proposals,

Attachment B-emphasized all blanks are to be filled in and that "domestic corporation" means a corporation registered in Maryland and that a "foreign corporation" means a corporation not registered in Maryland,

Attachment C-explained the contract affidavit is reaffirmation of bid/proposal affidavit and not submitted with the proposal,

Attachment D- explained MBE forms to include requirement for Attachment D-1 to be submitted with the proposal

Attachment F-explained Price Proposal Instructions and Form

**~Effective Resource Management~**

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Attachment G-explained confidentiality and non-disclosure agreement  
Attachment H-explained conflict of interest affidavit/disclosure  
Attachment I-explained current Benefits Contracts  
Attachment J-explained certification of return of confidential data  
Attachment K-explained how to obtain confidential information  
Attachment L-explained State Employee Enrollment Data by Plan and Coverage

The State's Employee Benefits Representative, Diane Bell, summarized the RFP, Section 3.2 Consulting Services, and Jake Pyzik, summarized the RFP requirements for the Actuarial Services, Section 3.1 of the RFP. Bill Bowser then reviewed the balance of the Scope of Work Requirements of Section 3.

Then, the floor was opened to questions with the caveat that formal written answers to questions would only be given if the question were submitted in writing, preferably by e-mail. The verbal questions were answered. The transcript of those questions and answers can be obtained from the transcription services, Conference Reporting Services, Tel: 410-768-5918, for a \$25 fee. Please refer to Consultant and Actuarial Services F10R7200001.

Date issued July 14, 2006

Joy Epstein

Procurement Officer

1 Atch  
CAS Pre-Proposal Attendance List